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R&I PRESENTS AMERICA'S 1991

CHOICE IN CHAINS

Mixed Grill Kebab
With Rice Pilaf

9 GREAT CENTER OF THE PLATE IDEAS

Franchisees Drive New Marketing, Ad Strategies

HOW TO HUSTLE UP HEARTY BREAKFASTS

More Inside!
See Page 4

A CAHNERS PUBLICATION

FEB. 6, 1991

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ABOUT THE COVER

Surf and turf, popular center-of-the-plate idea for decades, has been skewed toward today's consumer trends and operators' need to cut costs. Here, morsels of meats, poultry and seafood are fashioned into a kebab. See our Taste feature on page 100 for how to offer the best value for meat, fish and poultry dollars.

34 R&I EXCLUSIVE: THE PEOPLE'S CHOICE IN CHAINS

What's America's favorite burger chain? Where's its favorite spot for seafood? Find out where Americans love to dine (in each of 11 industry segments) in this year's Choice in Chains, *R&I*'s annual consumer survey. We also reveal which chains score highest in each of seven categories—food quality, menu variety, value, service, atmosphere, cleanliness and convenience.

70 FRANCHISEES FRONT AND CENTER

Savvy franchisees are finding success with menus, advertising and promotions tailored to fit local markets. And as they break out of corporate molds, those granting their licenses are taking an uncharacteristic step back to watch—and take note. Operators profiled include a McDonald's franchisee with an Italian menu and disco, and a Hardee's franchisee opting for a meeting room.

120 HEARTY BREAKFASTS BY DAWN'S EARLY LIGHT

For many families, workers, vacationers and executives on the road, the only way to start the day is with a hearty breakfast. Home-style classics such as French toast, pancakes, bacon and eggs have been restyled by chefs for contemporary tastes and diets. Our Food feature, with its new ideas, recipes and preparation tips from the experts, is an eye-opener.

153 NOODLING OVER ASIAN PASTA POSSIBILITIES

Bombay Bicycle Club lists among its bestsellers yakisoba, a savory stir-fried noodle dish that diners like for its good value and novelty. Looking for a success story for your menu? Check out Product Know-How's recipes and concise Asian Noodle Guide.

TASTE 100
The new center of the plate: Pan-baked cod, dressed with tomato-basil sauce, is ready to dazzle patrons of a midscale establishment.

■ CUSTOMER SURVEY

THE PEOPLE'S CHOICE

This year's winners of the *R&I* Choice in Chains awards all have one thing in common: They *satisfy.*

By Brian Quinton

If only keeping diners happy were as simple as providing a smile, a second cup of coffee and the right change!

It isn't, of course. Fulfilling customers' needs takes a lot more. That's what makes the results of the annual *R&I* Choice in Chains survey so interesting: The concepts in the study are ranked solely on the basis of how well they satisfy, and they are judged not by their peers but by their patrons. These results come from customers, not consultants. The survey is done by mail, but it can be thought of as an exit poll taken just outside the front door.

Choice in Chains is now in its 11th year, and the very name carries more meaning than ever. Today's fragmented restaurant market believes above all in its right of *choice*, beginning with choice of product. Food quality and menu variety are important to these people. To satisfy them, a chain must tailor its products to their specific needs. If customers don't like what they get, they move on to the next restaurant—often right next door.

The market also wields new powers of choice over *how* it buys food. Takeout, home delivery, heat-and-eat, supermarket delis, food courts, chain outlets in institutions, and microwavable packaging are all new options for the food purchaser. Convenience and service take on different meanings in each of these settings. It's the operator's job to divine the service level the

continued on page 38

Chi-Chi's takes top honors among Mexican chains for service, high-quality food and diverse menu.

1991 WINNERS

Burgers
WENDY'S

Sandwiches
RAX

Pizza
PIZZA HUT

Mexican
CHI-CHI'S

Dinner Houses
THE OLIVE GARDEN

Seafood
RED LOBSTER

Family Dining
CRACKER BARREL

Cafeterias
LUBY'S

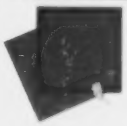
Chicken
GRANDY'S

Steak
RYAN'S FAMILY STEAK HOUSES

Sweets
BASKIN-ROBBINS

CHOICE IN CHAINS

ATTRIBUTE LEADERS



QUICK SERVICE

These quick-service chains scored highest on the seven qualities measured in the 1991 Choice in Chains survey (Scores are out of five possible points; ties went to chains with higher patronage).

FOOD QUALITY

1. Häagen-Dazs	4.33
2. T.J. Cinnamons	4.32
3. Baskin-Robbins	4.31

MENU VARIETY

1. Baskin-Robbins	3.99
2. Grandy's	3.75
3. Wendy's	3.73

GOOD VALUE

1. Little Caesars	3.77
2. Rally's	3.76
3. White Castle	3.75

GOOD SERVICE

1. Grandy's	3.89
2. TCBY	3.70
3. Baskin-Robbins	3.67

ATMOSPHERE

1. Captain D's	3.47
2. Long John Silver's	3.45
3. TCBY	3.44

CLEANLINESS

1. TCBY	3.54
2. T.J. Cinnamons	3.72
3. Mrs. Fields	3.70

CONVENIENCE

1. McDonald's	3.96
2. Domino's	3.91
3. Burger King	3.71

Patrons compute "value" in different ways but they all expect to find it on the menu.

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consumer expects and to deliver it consistently.

Finally, dining customers in today's market insist on defining "value" in their own way. It's no longer simple dollars and cents. Value is now a complex equation taking in various intangible "costs": travel time to the restaurant, for example; or time taken away from work or family; or the nutritional cost of eating out vs. a salad at home. On the plus side, there are the dividends of not having to cook or clean up, and the pleasure of giving the family a special treat. But don't kid yourself. No matter how patrons define "value," they expect to find it there on the menu.

Despite this fragmentation, many familiar faces appear in the Choice in Chains winners' circle for 1991. For the fifth time in six years, Wendy's heads the burger category, while Baskin-Robbins and Grandy's roll up their fourth wins in the sweets and chicken segments. Pizza Hut takes pizza honors for the seventh consecutive year. Red Lobster wins the seafood segment once again, as Luby's, Chi-Chi's, Rax and The Olive Garden do theirs. Only two of the winners are first-timers: Cracker Barrel Old Country Stores, which was newly included on this year's questionnaire; and Ryan's Family Steak Houses.

Why such steadiness at the top? Evidently, these concepts have latched onto part or all of the formula for customer satisfaction and are able to keep producing it time and time again. In some cases, their consistent wins have been at odds with their overall performance. Wendy's led the Choice in Chains burger contestants for most of the late '80s; yet its stores saw traffic counts and sales volumes slip during that same period. And Rax might like to work some of its patron-pleasing magic on its financials, which haven't shown much enchantment lately.

HOW THE SURVEY WORKS

As the Choice in Chains survey moves into its second decade, *R&I* has refined its methodology to make it easier to pinpoint just what patrons find most satisfying about a concept. The research firm of National Family Opinion sent questionnaires to 4,000 households around the country. Of these, 2,606 responded. The forms asked those who had patronized a given chain in the previous 12 months to score it on seven separate satisfaction criteria:

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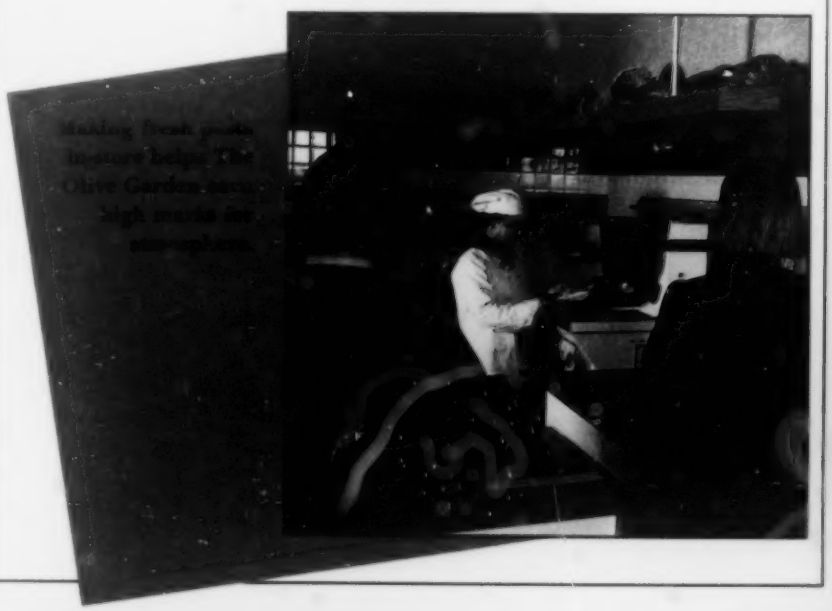

CHOICE IN CHAINS

Pizza Hut grabs the gold in the pizza segment for the seventh year running.

continued from page 38

food quality, menu variety, value, service, atmosphere, cleanliness and convenience. In each category, the chain could earn as many as five points or as few as one. Any chain visited by fewer than 100 survey respondents in the past year was eliminated.

Those individual attribute scores are averaged to produce an overall index for the chain. That's the figure *R&I* uses to determine the rankings; it immediately follows each name in the tables. Where two chains score evenly, their patronage by respondents in the last year serves as a tie-breaker.

For the first time, *R&I* is publishing the scores each chain receives for its attributes. Now it is easy to see not only which hamburger concept earns the highest overall score from customers, but which they think offers the best value, the widest menu variety, or the most pleasant atmosphere. Attribute leaders for each segment are highlighted on the chart. And a pair of sidebars lists the fast-food and full-service leaders in those same attributes.

AND NOW, THE WINNERS

The people's choice in burgers is **Wendy's** again this year. The Dublin, Ohio-based chain has racked up its fifth Choice in Chains win in the hamburger segment since 1985. It also boasts the best scores in the segment on two vital attributes: menu variety, thanks perhaps to the SuperBar and the Super Value menu, and food quality.

Like most of the fast-food concepts tested, Wendy's greatest demographic pull is on those under 21. But the chain also draws more females than males; many of these women, it is assumed, are part of the young-parent group that makes up the dominant life stage among Wendy's customers. Wendy's also scores a solid third among all chains in the Choice in Chains patronage ranks—not surprisingly, behind McDonald's and Burger King.

For the second time since sandwiches became a separate category in 1989, **Rax** takes top honors among sandwich concepts. The Columbus, Ohio-based chain also scores higher than its direct competition in four attributes: menu variety (once again, use of salad bars might contribute to this), good value, atmosphere and cleanliness.

Rax is a grown-up pleasure. Of female heads of households who patronized Rax in the last year, 41.7% like it a lot. That makes women Rax's strongest demographic constituency; only about 30% of male adult patrons made the same statement, and less than 28% of the under-21 crowd. The chain's strongest life-stage appeal is to retired older couples.

If Choice in Chains were an organized sport, we'd retire its pizza paddle: For the seventh year running, **Pizza Hut**, Wichita, Kan., grabs the gold for pizza-chain popularity. At a time when the segment's Big Three are fast approaching one another in their menus, pricing and distribution channels, Pizza Hut maintains a very comfortable lead in the minds of consumers, who say it tops the rest of the pizza segment in the quality of its product and the atmosphere and cleanliness of its stores. Pizza Hut also has the highest yearly patronage of any full-service chain, and ranks fifth on that measure among all chains in the survey.

Red Lobster beats seafood competitors in food quality.

Pizza is a teenage favorite generally; almost all the pizza chains surveyed score better with them than with adults. Still, Pizza Hut's under-21 appeal is much greater than most. More

continued on page 48

ATTRIBUTE LEADERS

FULL SERVICE

These full-service chains scored highest on the seven qualities measured in the 1991 Choice in Chains survey (Scores are out of five possible points; ties went to chains with higher patronage):

FOOD QUALITY	
1. Stuart Anderson's	4.35
2. The Olive Garden	4.28
3. Cracker Barrel	4.24
MENU VARIETY	
1. Luby's	4.41
2. Furr's	4.36
3. T.G.I. Friday's	4.36
GOOD VALUE	
1. Ryan's Steak Houses	4.16
2. Cracker Barrel	3.97
3. King's Table	3.96
GOOD SERVICE	
1. The Olive Garden	4.12
2. Ryan's Steak Houses	4.12
3. Benihana of Tokyo	4.12
ATMOSPHERE	
1. The Olive Garden	4.28
2. Benihana of Tokyo	4.23
3. Steak & Ale	4.16
CLEANLINESS	
1. The Olive Garden	4.16
2. Stuart Anderson's	4.07
3. Steak & Ale	4.06
CONVENIENCE	
1. Luby's	3.74
2. Morrison's	3.67
3. Sizzler	3.64

CHOICE IN CHAINS

The pleasure effect: Sweets chains score highest for perceived food quality.

continued from page 43

than 69% of its teen customers like Pizza Hut a great deal, compared to 34.2% of Domino's and 53.1% of Little Caesars.

Full-service chain **Chi-Chi's** is this year's most popular Mexican concept. More than half of those who patronized the Louisville, Ky.-based company in the last year like it very much. That approval is pretty evenly spread out among men, women and young people, but the chain exerts an undeniable appeal on the young: Young singles, young couples and young parents are the most common life stages among its most satisfied customers.

The dinner-house vote once again demonstrates the enduring popular appeal of an Italian menu. **The Olive Garden** has been a candidate in this segment for two years; and for two years in a row, the Orlando, Fla.-based chain has won. In fact, The Olive Garden earns the highest overall score of the entire survey. It ranks first for good service, atmosphere and cleanliness—not just in the dinner-house segment, but among *all* full-service chains.

It's only fair to note, however, that Stuart Anderson's Black Angus/Cattle Company places a very close second with survey respondents. Only a slightly lower patronage than The Olive Garden's and *R&I*'s dislike for ties keep the Los Altos, Calif.-based concept from sharing top honors among dinner houses. If it's any consolation, Stuart Anderson's leads the segment in value and convenience. Even more impressive, it beats every other chain in the survey in the field of food quality.

Like its relative The Olive Garden, another General Mills concept, **Red Lobster**, has become a perennial segment leader, winning for the third time since seafood became a separate Choice category three years ago. The Orlando, Fla.-based chain takes most of the attribute honors too, winning for food quality, menu variety, service, atmosphere and cleanliness. Among full-service chains, only Pizza Hut is patronized more over the course of a year.

As the only full-service seafood chain with stores nationwide, it's natural that the proportion of patrons who like the chain "a great deal" is much higher for Red Lobster than for its quick-service competitors. More unexpected is the chain's high appeal for its young adult customers, more than 72% of whom claim to like it a great deal.

In addition to grabbing the brass ring among family-dining chains, **Cracker Barrel Old Country Stores** almost pulls off a clean sweep of the seven attributes; only convenience gets away. Surprisingly, the Lebanon, Tenn.-based chain receives more "like a great deal" votes from its under-21 customers than from adult patrons. Among life-stage groups, customers are heavily skewed toward young and middle-age parents.

Luby's, San Antonio, beats out four other cafeteria competitors, and pulls the highest indices in four of seven attributes: food quality, menu variety, service and convenience. In fact, it's worth noting that all the cafeteria chains earn high grades both for the quality of their food and menu variety.

Once again, this year's patrons have honored **Grandy's**, Lewisville, Texas, as the chicken chain they are most satisfied with. Grandy's scores best on menu variety, value, atmosphere, cleanliness and service. Its use of "grannies" who help serve, seat customers and pour beverage refills, might explain why it does particularly well with families of all ages, although most other chicken concepts surveyed are strongest with singles.

Last year, **Ryan's Family Steak Houses**, Greer, S.C., won the South in a special competition for regional chains. In an effort to create an "absolute" index of customer satisfaction, *R&I* now includes those regional chains in the body of the survey; and Ryan's turns out the 1991 steakhouse champ. Especially popular with young singles, young parents and those under 21, Ryan's earns particular kudos for its value, service and—with its trademark salad bar—menu variety.

And after a two-year hiatus, ice cream is back at the head of the class as the customers' favorite indulgence, and **Baskin-Robbins** is their favorite place to indulge. The Glendale, Calif.-based chain gets the highest marks for menu variety of all the treat chains—in fact, among all fast-food chains—and it scores among the top-five quick-service concepts in service, food quality and cleanliness, too. It's no shock that young parents are the most likely to like Baskin-Robbins. Interestingly, though, the *second* biggest "like a great deal" vote comes from retired older couples, followed by older singles. So much for the notion that ice cream is kid stuff.

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CHOICE IN CHAINS

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Segment/Chain	Overall index*	Food quality	Menu variety	Good value	Good service	Atmosphere	Cleanliness	Convenience
BURGERS								
Wendy's	3.629	3.84	3.73	3.51	3.58	3.41	3.64	3.69
McDonald's	3.519	3.37	3.43	3.43	3.51	3.29	3.64	3.96
Carl's Jr.	3.490	3.61	3.61	3.39	3.39	3.42	3.52	3.49
Whataburger	3.474	3.77	3.45	3.57	3.49	3.15	3.42	3.47
Hardee's	3.473	3.53	3.51	3.45	3.40	3.28	3.46	3.68
Sonic Drive-Ins	3.464	3.59	3.47	3.48	3.57	3.19	3.35	3.60
Rally's	3.441	3.65	3.23	3.76	3.65	2.93	3.38	3.49
Burger King	3.434	3.52	3.42	3.39	3.37	3.20	3.43	3.71
Jack In The Box	3.364	3.45	3.63	3.31	3.34	3.06	3.32	3.44
Krystal	3.339	3.40	3.28	3.75	3.33	2.95	3.21	3.45
White Castle	3.209	3.29	2.80	3.75	3.33	2.72	3.25	3.32
SANDWICHES								
Rax	3.507	3.66	3.66	3.46	3.48	3.36	3.53	3.40
Arby's	3.454	3.72	3.45	3.38	3.43	3.25	3.49	3.46
Subway	3.440	3.75	3.39	3.40	3.52	3.00	3.47	3.55
Roy Rogers	3.344	3.51	3.42	3.28	3.36	3.24	3.37	3.23
A&W	3.340	3.58	3.37	3.38	3.44	3.12	3.32	3.17
PIZZA								
Pizza Hut	3.562	3.96	3.51	3.39	3.48	3.47	3.54	3.59
Little Caesars	3.436	3.57	3.26	3.77	3.49	3.01	3.44	3.51
Round Table Pizza	3.426	3.75	3.46	3.27	3.43	3.23	3.28	3.56
Domino's Pizza	3.414	3.51	3.16	3.37	3.71	2.90	3.34	3.91
Godfather's Pizza	3.414	3.81	3.36	3.33	3.37	3.32	3.44	3.27
Pizza Inn	3.407	3.49	3.38	3.43	3.38	3.32	3.38	3.42
MEXICAN								
Chi-Chi's	3.726	4.02	3.96	3.54	3.73	3.92	3.74	3.17
El Torito	3.686	3.78	3.95	3.52	3.58	3.90	3.73	3.24
Taco Bell	3.470	3.58	3.47	3.73	3.47	3.13	3.31	3.60
Del Taco	3.376	3.44	3.40	3.51	3.40	3.15	3.32	3.41
Taco John's	3.357	3.50	3.39	3.44	3.42	2.93	3.28	3.54

*Overall index is the average of the seven attribute scores

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CHOICE IN CHAINS

continued from page 52

Segment/Chain	Overall index*	Food quality	Menu variety	Good value	Good service	Atmosphere	Cleanliness	Convenience
DINNER HOUSE								
The Olive Garden	4.009	4.28	4.12	3.74	4.12	4.28	4.16	3.36
Stuart Anderson's	4.006	4.35	4.21	3.80	4.02	4.11	4.07	3.48
Bill Knapp's	3.880	4.14	4.23	3.70	4.00	3.81	3.95	3.33
Marie Callender's	3.866	4.14	4.21	3.40	3.80	4.09	4.02	3.40
T.G.I. Friday's	3.843	4.08	4.36	3.47	3.81	4.02	3.88	3.28
Benihana of Tokyo	3.819	4.18	3.77	3.24	4.12	4.23	4.06	3.13
Chili's	3.811	4.10	3.93	3.56	3.88	3.96	3.88	3.37
Applebee's	3.794	4.07	4.02	3.51	3.74	3.88	3.91	3.43
Bennigan's	3.761	4.03	4.13	3.52	3.67	3.92	3.77	3.29
Houlihan's	3.724	4.07	4.11	3.43	3.71	3.97	3.79	2.99
The Ground Round	3.620	3.80	3.84	3.48	3.66	3.65	3.57	3.34
Fuddruckers	3.573	4.08	3.50	3.48	3.62	3.54	3.68	3.11
SEAFOOD								
Red Lobster	3.830	4.19	4.18	3.58	3.84	3.81	3.88	3.33
Captain D's	3.606	3.75	3.65	3.60	3.67	3.47	3.60	3.50
Long John Silver's	3.590	3.79	3.59	3.56	3.63	3.45	3.58	3.53
Skipper's	3.536	3.79	3.50	3.53	3.57	3.36	3.59	3.41
FAMILY DINING								
Cracker Barrel	3.990	4.24	4.21	3.97	4.00	4.12	4.00	3.[illegible]
Bob Evans	3.857	4.04	4.05	3.79	3.93	3.81	3.92	3.46
Shoney's	3.816	3.94	4.11	3.82	3.85	3.64	3.73	3.62
Bakers Square	3.784	4.15	4.15	3.51	3.74	3.72	3.85	3.40
Perkins	3.684	3.81	4.05	3.51	3.61	3.63	3.71	3.47
Country Kitchen	3.679	3.78	3.93	3.69	3.67	3.62	3.71	3.35
PoFolks	3.661	3.74	3.85	3.78	3.69	3.65	3.64	3.28
King's Table	3.620	3.59	4.09	3.96	3.55	3.35	3.49	3.31
Denny's	3.554	3.59	3.88	3.63	3.51	3.32	3.49	3.46
Carrow's	3.541	3.65	3.85	3.43	3.47	3.49	3.57	3.33
Village Inn	3.534	3.66	3.79	3.41	3.46	3.45	3.58	3.39
Big Boy	3.474	3.51	3.77	3.43	3.41	3.36	3.46	3.38

*Overall index is the average of the seven attribute scores

continued on page 60

CHOICE IN CHAINS

continued from page 56

Segment/Chain	Overall index*	Food quality	Menu variety	Good value	Good service	Atmosphere	Cleanliness	Convenience
Luby's	4.021	4.22	4.41	3.91	4.07	3.79	4.01	3.74
Morrison's	3.979	4.13	4.33	3.95	3.98	3.83	3.96	3.67
Furr's	3.930	3.99	4.36	3.91	4.01	3.71	3.97	3.56
Piccadilly	3.923	4.02	4.27	3.78	3.95	3.78	4.02	3.64
Wyatt	3.789	3.83	4.13	3.78	3.77	3.58	3.80	3.63
Grandy's	3.784	3.87	3.75	3.75	3.89	3.75	3.84	3.64
Chick-fil-A	3.474	3.93	3.35	3.37	3.62	3.18	3.53	3.34
KFC	3.441	3.75	3.25	3.42	3.45	3.15	3.43	3.64
Popeyes	3.369	3.75	3.35	3.42	3.30	3.09	3.32	3.35
Church's	3.307	3.52	3.20	3.46	3.32	3.02	3.22	3.41
Ryan's	4.010	4.18	4.31	4.16	4.12	3.74	3.96	3.60
Steak & Ale	3.929	4.24	4.07	3.58	3.99	4.16	4.06	3.43
Golden Corral	3.890	4.05	4.15	3.94	3.94	3.77	3.79	3.59
Sizzler	3.844	3.98	4.17	3.78	3.80	3.69	3.85	3.64
Quincy's	3.824	3.98	4.02	3.78	3.92	3.72	3.80	3.55
Western Steer	3.733	3.93	3.92	3.69	3.71	3.64	3.68	3.55
Western Sizzlin	3.714	3.90	3.93	3.73	3.73	3.57	3.63	3.51
Bonanza	3.686	3.80	3.94	3.78	3.72	3.53	3.57	3.46
Ponderosa	3.639	3.65	3.95	3.79	3.65	3.44	3.49	3.50
Baskin-Robbins	3.669	4.31	3.99	3.26	3.67	3.26	3.66	3.53
TCBY	3.623	4.15	3.45	3.23	3.70	3.44	3.84	3.55
Haagen-Dazs	3.500	4.33	3.47	3.03	3.51	3.27	3.66	3.23
T.J. Cinnamons	3.499	4.32	3.14	3.14	3.66	3.29	3.72	3.22
Dairy Queen	3.430	3.70	3.52	3.45	3.44	3.05	3.32	3.53
Carvel	3.427	3.85	3.47	3.21	3.52	2.98	3.41	3.55
Dunkin' Donuts	3.401	3.71	3.44	3.43	3.51	2.97	3.30	3.45
Mrs. Fields	3.401	4.26	3.16	2.78	3.58	3.04	3.70	3.29

* Overall index is the average of the seven attribute scores

ACTION EXPRESS

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